

The Rego Administrative Base Kit

Maintain an effective & user-friendly environment with Administrative portlets and processes.

The base kits in regoFoundation's PPMExpress are built on core best practices we've refined for over a decade. Our PPM engagements span 400+ customers and include thousands of development requests. Rego Base Kits are the fastest, most cost-effective way to implement the widest array of Project and Portfolio Management solutions. Implementing these items collectively has saved organizations thousands of dollars.

CA PPM administration is critical to user adoption, enhancements, and data integrity. The Rego Administrative Base Kit is loaded with 21 portlets, 16 processes, 6 technical tricks, and 9 training guides to give your team effective tool support for maintaining a productive and user-friendly environment.

What's Included:

Rego Developed Portlets

- ✔ **CA PPM Schema:** The CA PPM Schema portlet provides information for developing new content or updating existing content for CA PPM Portlets, Processes, Lookups, Reports, or even Fields on an Object.
- ✔ **Active Workflow Processes:** View all of the workflow processes within the system.
- ✔ **Communications Portlet—Simple:** The Communications Simple portlet provides a simple mechanism to communicate with CA PPM users via the Homepage.
- ✔ **Communications Portlet—Complex:** This portlet provides a customizable mechanism to communicate with CA PPM users via the Homepage using external, internet standard JavaScript libraries.
- ✔ **Current Proxies:** Provides a user with an overview of all the resources in the system currently using a proxy.
- ✔ **Custom License Count:** Displays the license type and amount of users with each type of license.
- ✔ **Custom License Count—Detail:** Displays the license type information for all users within CA PPM as well as last login date for clean-up.
- ✔ **Custom Portlet Configs:** Displays all portlets where the user has modified any settings like the filter or list views.
- ✔ **Data Issues—Projects:** Used to identify data exceptions related to project setup.
- ✔ **Data Issues—Resources:** Used to identify data exceptions related to resource setup.
- ✔ **Global Action Items:** Helps users and admins to keep track of action items in CA PPM.
- ✔ **Inactive Resource Data Clean-up:** Displays information for inactive resources that still have pending items on active objects.
- ✔ **Invalid Transactions:** Displays all of the transactions that did/will not post in CA PPM, as well as the resolutions to many common errors.
- ✔ **Investment Instance Rights by Resource:** Allows administrators or other managers to see what resources have been granted instance rights to any investment.
- ✔ **Job Schedule Details:** Shows all active jobs and displays all of the schedule information for those jobs.
- ✔ **Last Logged in:** Provides the administrator with an overview of all users within the system and their last login.
- ✔ **Portlets and NSQL Queries:** Provides administrators with the ability to search queries developed in the past with particular attributes.
- ✔ **Portlets on Pages:** Displays portlets located on each page within CA PPM for assistance with troubleshooting or upgrading.
- ✔ **Process Instance Errors:** Shows all processes that error.
- ✔ **Resource Rights:** Displays information for all global, OBS, and instance based rights present in the system.
- ✔ **Users Logged In:** Displays all users logged into the system. This portlet is helpful to determine the capacity during peak times, users still working before downtime, and the ability to view users logged in during the day. The portlet will display the resource, ID, OBS unit, OBS path, and when the user's session was last updated.

Rego Developed Processes

- ✔ **Auto Approve Old Timesheets:** Quickly close out timesheets for a specified timeframe for period closure.
- ✔ **Deactivate User:** This is a process to lock any users that have not logged in within the last 90 days.
- ✔ **Email Process Instance Errors:** This process will email a selected group within CA PPM informing them of process errors that are currently in the system.
- ✔ **Grant Approve Time to Proxy:** This process utilizes the proxy feature within CA PPM to assign timesheet approval and edit rights to a proxy for any resources where the user is the current resource manager.
- ✔ **Grant Edit Time to Proxy:** This process utilizes the proxy feature within CA PPM to assign timesheet edit rights to a proxy for any resources where the user is the current resource manager. This process would allow a resource manager to designate a subordinate the ability to enter time on other resources' behalf while still going to the resource manager for approval.
- ✔ **Grant Edit Skill and Calendar Rights:** Grants the ability for the user's proxy, resource manager, booking manager, and resource(s) to edit both the skill and calendar sections. Not only will the workflow add in any new rights, but it will also check for rights that no longer exist (resource manager has changed, etc).
- ✔ **Grant PM Collaboration Manager Rights:** This workflow will execute a query that gives a Project Manager the Collaboration Manager rights to their projects. Collaboration Manager rights allow the user access to the "Collaboration" tab for actions items and file storage.
- ✔ **Grant Resource Timesheet Edit Rights:** Grant each resource timesheet edit instance rights to his or her own timesheets.
- ✔ **Grant RM Timesheet Edit Rights:** This workflow will execute a query that gives a Resource Manager Timesheet Edit rights for their resources. Timesheet Edit rights are not inherent for Resource Managers when they are named as an individual's resource manager.
- ✔ **Grant RM Calendar and Time Rights:** This workflow will execute a query that gives a Resource Manager Calendar Edit and Timesheet Edit rights for their resources. These rights are not inherent for Resource Managers when they are named as an individual's resource manager.
- ✔ **Grant Team Project Edit Rights:** The Grant Team Project Edit Rights workflow allows a project manager to grant Project – Edit Management rights to all users staffed on the project. The process will also remove any rights from members that have been removed from the project.
- ✔ **Open and Close Periods:** The Open and Close Periods process closes the earliest open time period and opens the first closed time period after the latest open time period. This process may be used for a non-administrator to open and close time periods without having access to the administrative side of the tool.
- ✔ **Scheduled Jobs Cleanup:** The Scheduled Jobs Cleanup process removes all completed job instances that have run before a date set by the administrator. Based on that date, the workflow will eliminate all jobs that have surpassed that threshold.
- ✔ **Turn Off Notifications for All:** The Turn off Notifications process disables all Email, SMS, and Alerts notifications for all users. The script may be modified to include all users or all users that have been created within the last day.
- ✔ **Unlock Projects:** The Unlock Projects workflow process can be run through the "Execute a Process" job. The workflow will execute a query that will automatically unlock projects that have been exported or checked out for over 2 days. This prevents any projects from remaining in the "locked" state for a long period of time and preventing time from posting to these projects.
- ✔ **Update Email IDs:** The Update Email IDs workflow sets all users' email addresses to non-working by appending a "ZZZZ" to the end of the email address. This process is used when there are refreshes to your Development or Testing environments to prevent emails from going to users. A second process is included in this workflow to revert the email addresses.

Rego Technical Tricks

- ✔ **Admin Ability to Login as Any User:** This solution provides an administrator the ability to log into the CA PPM application as any user in the system. This ability is especially helpful when troubleshooting user issues and security settings.
- ✔ **CA PPM Hidden Pages—Flush Caches:** This document provides an overview of how to clear the cache on an application server without exiting the CA PPM Application itself, utilizing a hidden page within the system.
- ✔ **From XOG to a Page:** This guide will show you how to create a page, add the portlet to the page, and add the page to the menu.
- ✔ **Increase OBS Field Width:** Provides instructions on how to update your CA PPM theme's CSS code to increase the width of the OBS field.
- ✔ **Removing Buttons:** This Tech Trick provides step-by-step instructions for removing standard buttons from the screen.
- ✔ **User Management—On Demand Portal & ODUM Utility:** This technical trick provides instructions on how to make bulk additions or changes of users to On Demand environments using the ODUM utility.

Training Guides

- ✔ **Administration—Beginner:** Learn administrative tasks and best practices in this basic administration CA PPM deck, which includes setting up resources, security groups, OBSs, lookups, time reporting periods, fiscal time periods, calendars, jobs, and timeslices.
- ✔ **Administration—Advanced:** Learn advanced administrative development tasks—including Objects and Fields, Basic SQL Queries, Object Portlets, Basic Processes, and XOG—in this technical CA PPM deck for non-technical people.
- ✔ **Administration—Advanced Objects and Fields:** This deck outline covers a CA PPM Studio overview, objects, attributes and fields, views, and the Action Menu.
- ✔ **Administration—Advanced Portlets, Lookups, & Queries:** Covers the definition of and use of Lookups in CA PPM. Queries and Portlets are also reviewed.
- ✔ **Administration—Advanced UI Themes, Menus, & Financials:** This deck outline covers User Interface themes, menu configuration, systems options, and financial administration within CA PPM.
- ✔ **Administration—Advanced XOG:** This deck covers an introduction to XOG, system requirements, installation and setup, XOG files and procedure, best practices, and other XOG methods and XML creation.
- ✔ **Data Model—Beginner:** This deck will review the basic CA PPM data model and provide training on how to write queries within CA PPM for use in your portlets and reports.
- ✔ **Data Model—Advanced:** This training document covers tables, notifications, captions, and custom attributes on objects.
- ✔ **Timeslices—Overview:** This intro to timeslices deck will cover an Overview of Timeslice Fundamentals, Terminology, Best Practices, Diagnostics, and the basic SQL Constructs to get you started.

Promote user adoption and data integrity with Rego's Administrative Base Kit.



Rego Base Kits are Supported by regoXchange

regoXchange is the largest PPM content library with hundreds of prebuilt portlets, training artifacts (including videos), reports, technical tricks, and workflows designed to help users increase the value of their PPM tool.

Pricing Information

The Rego Administrative Base Kit is priced as a one-time cost, or users can subscribe to regoXchange for access to all regoXchange content.

# of CA PPM Users	Administrative Base Kit	regoXchange theWorX Subscription
0-99	\$1,000	\$2,500
100-499	\$2,000	\$5,000
500-2,999	\$2,000	\$7,500
3,000 and Up	\$2,000	\$10,000

Other Base Kits Offered by Rego

- Administrative
- Adoption Metrics
- Demand Management
- Financial Management
- Performance Monitoring
- Portfolio Management
- Project Scheduling
- Resource Management
- Resource Management—Advanced
- Time Tracking